CodeEnforcement
MECKLENBURG COUNTY
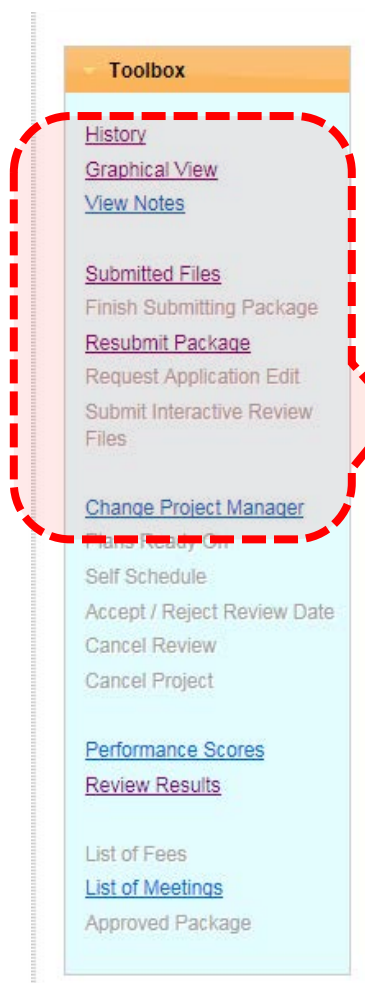
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Customer Guide: **Navigating the EPM Dashboard Toolbox**

⚠️ ***Troubleshooting note:*** At different times throughout the review cycle, one or more of these links may be disabled (grayed out and inaccessible for editing or viewing). If you find you are trying to do "this or that" and the system isn't allowing you to – it is most likely designed that way based on the status of a project. For purposes of defining each of the options here, we will assume that all are enabled (ignoring those that may appear grayed out in the examples).

Applicant's view of the project dashboard Toolbox:

Toolbox

- History
- Graphical View
- View Notes

- Submitted Files
- Finish Submitting Package
- Resubmit Package
- Request Application Edit
- Submit Interactive Review Files

- Change Project Manager
- Plans Ready On
- Self Schedule
- Accept / Reject Review Date
- Cancel Review
- Cancel Project

- Performance Scores
- Review Results

- List of Fees
- List of Meetings
- Approved Package

TOOLBOX PAGE:

HISTORY: Links to the "homepage" of a project. It is here that you can view the current review schedule and review the chronological history of entries, reports, etc.

GRAPHICAL VIEW: Links to a visual graph of review status and cycles. This is helpful when just trying to get a quick oversight of what trade reviews are pending/under Interactive Review/disapproved/and approved.

VIEW NOTES: Allows one to view all notes entered at the HISTORY page. When a project gets busy – the formatting of these entries can sometimes make it difficult to read but it can also be exported into an Excel file.

SUBMITTED FILES: Links to the latest submitted project package (plans and supporting documents being used for review). *This should not be confused with the APPROVE PACKAGE link as files will not receive approval stamps here
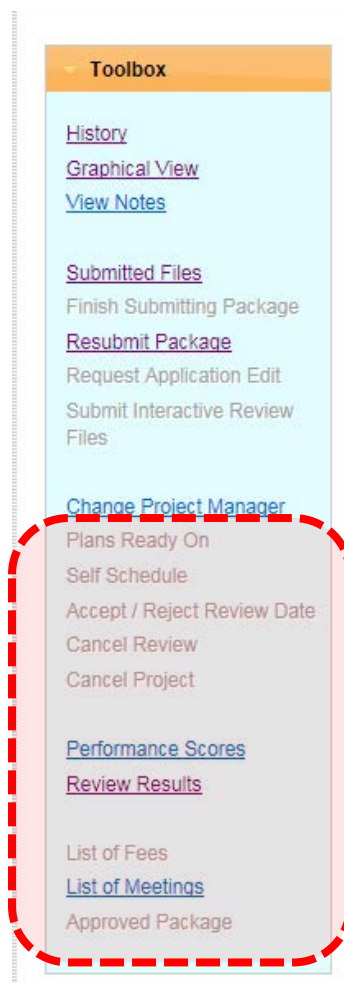
FINISH SUBMITTING & RESUBMIT PACKAGE: These links are typically only used by the customer to submit & resubmit project files.

REQUEST APPLICATION EDIT: This process is only available to a project manager as their application is going through ESTIMATION and before the plan review has begun. They can either use this when they are requesting a change or to respond to a request for more information from staff as it goes through the ESTIMATION process.

SUBMIT INTERACTIVE REVIEW FILES: This is used only when a member of the Code Enforcement review team has placed the project into INTERACTIVE REVIEW. It provides a portal where an applicant can upload revised files.

CHANGE PROJECT MANAGER: Allows existing project manager to make a change to the project manager (person who will receive all system generated notices or emails). NOTE: This manual action will become null and void and revert back to original project manager if the project application needs to be modified at a later time by staff.

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TOOLBOX PAGE (cont'd):

PLANS READY ON: Available anytime the project has yet to be scheduled. Applicant enters a projected date when plans will be ready and coordinator uses that date to build a tentative review schedule.

SELF SCHEDULE: Link gives applicant an option to self-schedule. This is not necessarily encouraged as applicant may not be aware of all the business rules involved when scheduling – they will have the ability to assign any plan reviewer to the project and spread the schedule out over more than 5 days, etc. If an applicant ever chooses this option, it is important that you let your coordinator know so that they can carefully review the schedule and be sure that it is compliant with business rules.

ACCEPT/REJECT REVIEW DATE: This link provides a portal where an applicant must go to finalize the proposed tentative review schedule they receive from coordinator. A result must be entered here within 48 hours of coordinator sending out the tentative schedule. Otherwise, the system will automatically release the reserved time and the project manager will need to re-enter a PLANS READY ON date and so project can be rescheduled.

CANCEL REVIEW: *BE AWARE OF THE DIFFERENCES BETWEEN THIS OPTION AND "CANCEL PROJECT" BELOW! This option cancels the reserved review schedule. It can only be used by a project manager if they are outside of the "5 business days prior to start of review" timeline. If they try to cancel the review to reschedule inside of that window – this option will be grayed out and they will need to contact their coordinator to "ABORT" the review.

CANCEL PROJECT: *BE AWARE OF THE DIFFERENCES BETWEEN THIS OPTION AND "CANCEL REVIEW" ABOVE! This option cancels the entire project. Use this option only when intended to not submit plans for plan review and permitting. If chosen accidentally, this action cannot be undone and project manager will need to apply for a new project to get back onto the system.
USE WITH EXTREME CAUTION -- this is used only to cancel the whole project, not merely abort a review schedule.

PERFORMANCE SCORES: Links to the scores each seal holder has in the Mecklenburg County A/E Pass Rate Incentives Program.

REVIEW RESULTS: This portal will take applicant to comments made by review team or marked up feedback files in any given cycle.

LIST OF FEES and LIST OF MEETINGS: Links to reference fees or prior meetings.

*APPROVED PACKAGE: Only after project has been permitted or closed out will this option be available. Links to all stamped approved final construction documents and the approved Sheet Index. Refer to CUSTOMER GUIDE: ACCESSING APPROVED PACKAGE.